

Appendix

1. Policy Evaluation

This section evaluates seven policy areas based on the survey questionnaire (Chapter 13).

1.1. Industry and Market Development

Figure A-1 shows the evaluation of industry and market development: how stakeholders in each country evaluate communicating industrial development visions, master plans, and statistics (policy #1). This policy refers to setting goals and fostering an environment that encourages the industry to achieve its target, and is meaningful where top-down decision making is necessary.

Figure A-1 indicates that the necessity for this policy is higher than effectiveness in most countries, except Korea and Indonesia, which means that the current status does not meet stakeholders' expectation in most countries. In Korea, the favourable recognition may be the result of the government's efforts in collecting statistical data, setting a concrete goal of increasing the national income in a master plan, and showing the government's positive attitude towards enhancing the content industry. In Indonesia, the government recognises the creative industry as the force driving economic development and has released its vision, mission, and goals. It even changed the name of the Ministry of Culture and Tourism to the Ministry of Tourism and Creative Economy, which clearly shows its standpoint and may be a reason for stakeholders' positive evaluation (see Chapter 4 for more detailed policies in these countries).

All eight countries recognise a moderate or high degree of necessity, although their evaluation of effectiveness varies. This suggests the importance of collecting statistical data, setting a master plan, and communicating it to stakeholders. The shared aim of

developing the region's content industry requires comparable statistical data and a regional master plan.

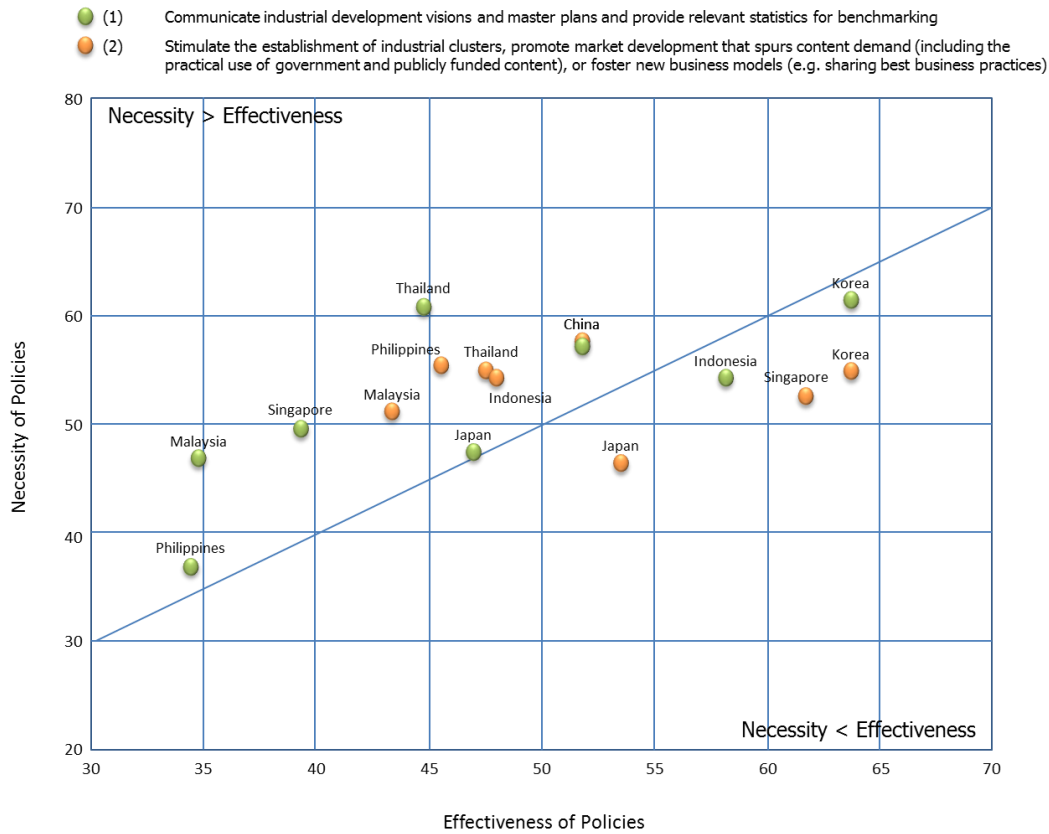
For organisational schemes and business relationships (policy #2), necessity is relatively high in Korea, Thailand, China, and Indonesia. Effectiveness is high in Korea and Indonesia. Korea, for example, established Content Korea Lab to promote start-ups to foster new business models. The government also favours establishing cooperative methods such as consortia of enterprises. Indonesia has introduced a framework for establishing business incubators to develop media content and supports communities that develop creative industries. These initiatives may have induced positive effects. Singapore sees low effectiveness for policy #1, which implies that, although the country is highly effective in implementing policy #2, it faces a limitation due to the size of its domestic industry, making it difficult for policy approaches such as establishing industry clusters, and relying instead on the efficiency of major players (e.g. Media Corp in broadcasting) to create the ecosystem.

In Korea and Japan, policy activities #1 and #2 both show Effectiveness (E) > Necessity (N) or are close to the $E = N$ 45-degree line, which suggests that the two countries have high performance in these areas. Future progress is expected in Malaysia, Thailand, and China, whose policy implementation is still either 'a work in progress' or 'planned or under planning' (Chapter 4, Table 4-10).

1.2. Organisational Schemes, Business Relationships

Figure A-2 shows the evaluation of organisational schemes and business relationships. The average level of necessity and effectiveness is relatively high for both policy activities. For policy activity #3 (Support industry-led organisations in aggregating industrial interests and/or functions), Malaysia, Japan, and Indonesia have relatively high performance.

Figure A-1: Industry and Market Development—Evaluation of Policy Area



Source: Evaluation Survey of Content Industry Promotion Policies.

The results in Malaysia and Japan, in particular, may reflect the fact that these countries have numerous industry organisations and agencies in the public and private sectors, which specifically oversee the content and creative industries. Malaysia has multiple ministries,¹ authorities,² industry organisations,³ and funders overseeing and handling the creative industry. Japan also has an ecosystem of several industry organisations across the sector as well as the value chain. In Indonesia, the creation of the Ministry of Tourism and Creative Economy⁴ has facilitated the performance of this policy

¹ E.g. Ministry of Communications, Information and Culture, and Ministry of Science, Technology and Innovation.

² E.g. Multimedia Development Corporation, National Film Development Corporation Malaysia, Malaysian Technology Development Corporation, Malaysian Communications and Multimedia Commission, Ministry of Entrepreneur and Co-operative Development, and Malaysian Investment Development Authority.

³ E.g. Creative Content Association Malaysia, Creative Content Industry Guild.

⁴ The Ministry of Tourism and Creative Economy was divided into the Ministry of Tourism and the Creative Economy Board.

area. Korea has relatively high necessity but has the lowest effectiveness among all countries, which may be a reflection of stronger leadership by government and related agencies (e.g. Korea Creative Content Agency). In the course of its development, however, the industry now seems to pursue approaches via industry-led organisations. The Philippines is the opposite case: of all the countries, it has the strongest demand, which represents the industry's expectation due to limited government support.

In general, industry organisations, whether driven by the private sector or facilitated by the public sector, contribute to expanding the industry while maintaining each party's interests. They also invite and protect new or small players, depending on the organisations' purpose. Such organisations can be a driving force in growing markets, requiring support through new policy frameworks or funds. From a policy perspective, it is essential to facilitate and build frameworks to realise such organisations. However, the industry or the market may face challenges once it undergoes structural changes and runs the risk of becoming a mere name or, worse, an obstructive factor. Thus, defining and isolating the roles and functions in the long term, and facilitating communication and liaising among multiple organisations are important in adapting to such changes.

For policy #4 (Support building of business relationships), Japan, Malaysia, and Thailand have high performance, although necessity is average. Japan's government has focused on facilitating business matching by organising events such as CoFesta⁵ and fostering collaboration. Thailand has also been hosting events through the government and industry organisations. The result for Malaysia may be explained by the contribution of government agencies such as Multimedia Development Corporation, which bridges companies, government, and funders. Indonesia and the Philippines, where $N > E$, have the highest necessity, representing demand for strengthening business-to-business

⁵ Japan International Contents Festival.

relationships. Indonesia is expected to improve its policy performance as the new ministry is facilitating business relationships. The Philippines, however, faces challenges as no government organisation deals with the content industry. Instead, implementation of policies is industry-specific and may need to be driven internally within the private sector.

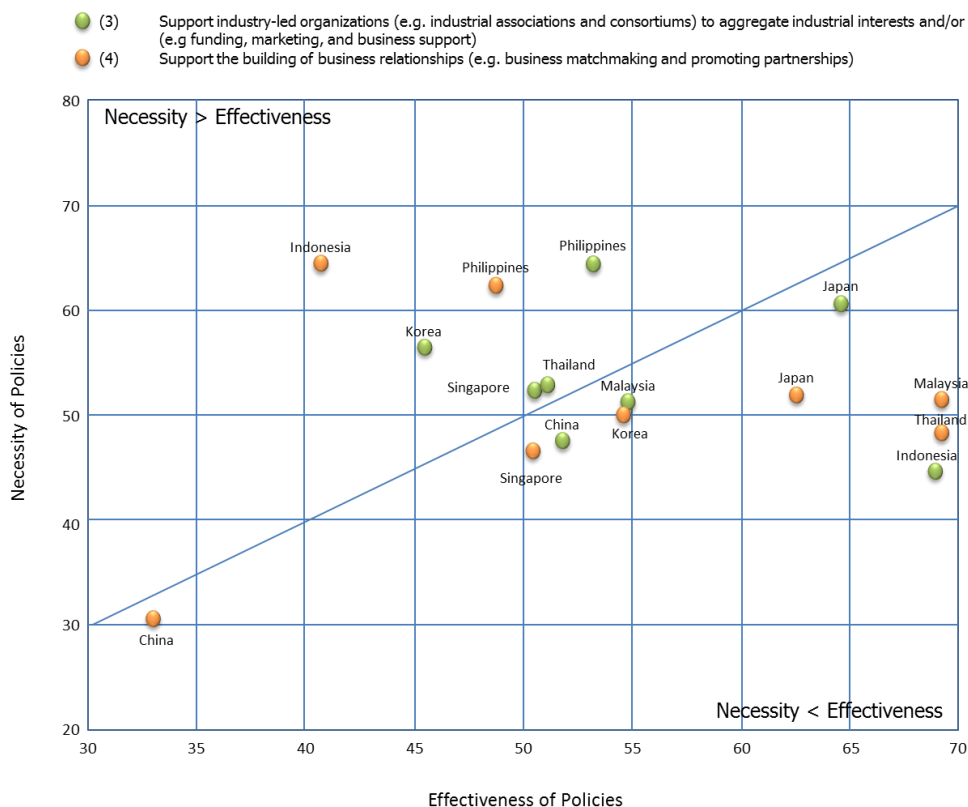
1.3. International Relationships

Figure A-3 shows the evaluation of the policy area concerning international relationships. The results are unique in the way the two policy activities are in contrast with the level of effectiveness. Low performance is seen in policy #5 (Establish international agreements) (except for the Philippines), and high performance in policy #6 (Promote brands and campaigns, international trade events, and meetings) (except for Indonesia).

Figure A-3 shows the evaluation of the policy activities to establish international agreements, including free trade agreements or bilateral co-production treaties. Stakeholders in all countries, except the Philippines, appear to expect further improvement. The number of the Philippines' international agreements is not large compared with those of the other seven countries. The favourable recognition in the Philippines may be related to its strong relationship with the United States (US). Many content companies in the country deal with outsourced work from the US, taking advantage of workers' English-language skills.

The high expectation for the establishment of international agreements reflects the expectation for a number of free trade agreement negotiations, which can enhance economic relationships in many areas, including the content industry. Attention should be paid not only to the establishment of international agreements but also to issues that can be solved through such agreements, all in order to develop the region's content industry.

Figure A-2: Organisational Schemes, Business Relationships—Evaluation of Policy Area



Source: Evaluation Survey of Content Industry Promotion Policies.

For policy #6, most countries have high performance, with three trends:

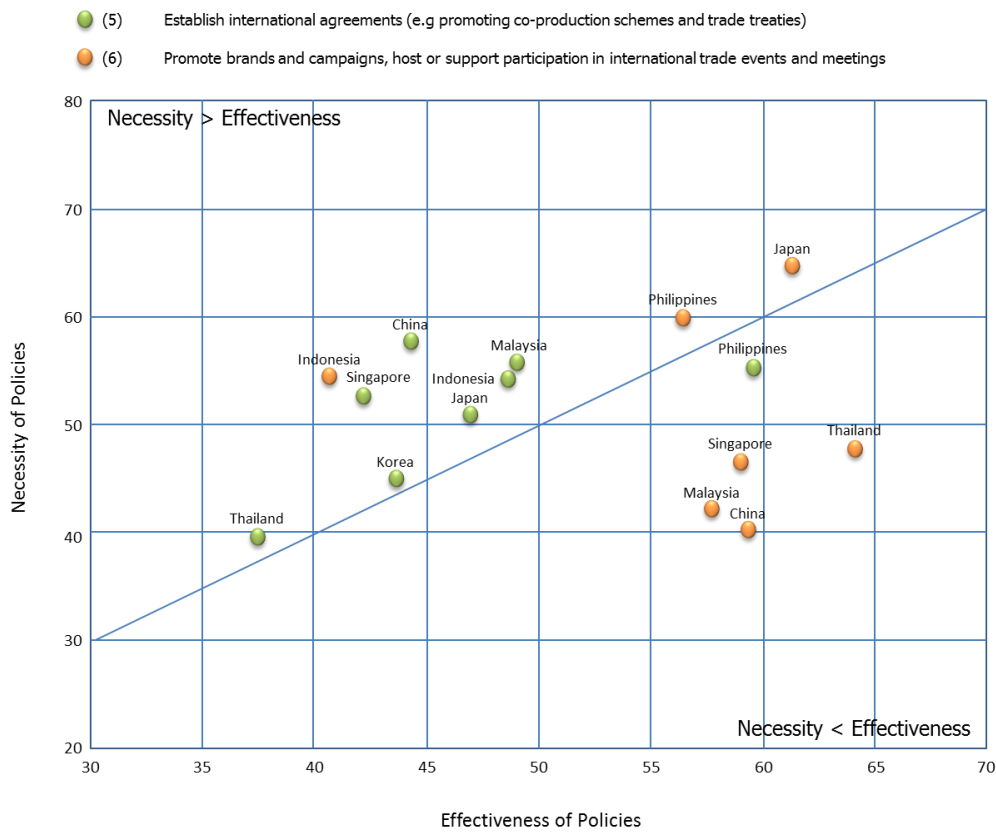
- (1) $E > N$: Korea, Thailand, Singapore, Malaysia, and China. These countries have leaned toward overseas development and focused on promoting brands and events. The ‘Korean Wave’ phenomenon, for example, is a successful brand. Thailand has been hosting international events. These activities allow industry players to enjoy a certain level of surplus where effectiveness significantly exceeds necessity.
- (2) $N > E$, with high effectiveness: Japan and the Philippines. These countries have benefited from certain effects of the policy despite the industry’s stronger demand. Japan has proven its effectiveness with related policies as witnessed by the ‘Cool Japan’ initiative. The industry, however, expects further promotion; it has the

highest necessity level among all the countries.

- (3) N > E area, with low effectiveness: Indonesia. The country is still in the initial phase of policy implementation.

To summarise, given that policy #6 has worked well in most countries, the others may want to consider and collaborate on regional branding and campaigns to strengthen international competitiveness. As the Asian content market is forecast to grow in the long term, the countries in the region could benefit from collaboration to attract funds and investments from other regions.

Figure A-3: International Relationships—Evaluation of Policy Area



Source: Evaluation Survey of Content Industry Promotion Policies.

1.4. Human Resources

Figure A-4 shows the evaluation of human resources. Variance in necessity and effectiveness is larger than that of other policy areas, which indicates that the situation is

significantly different among countries.

This especially applies to policy #7 (Establish standards, qualification and certification frameworks for related skills and knowledge), in which only Indonesia, the Philippines, and Singapore have implemented corresponding policies (Chapter 4). Indonesia has the highest demand, reflecting the value the government places on developing and fostering creative skills and individual talent. Its Vision and Mission of Creative Economy for 2025 initiative targets two goals out of six to strengthen human resource development (Chapter 4, Table 4-2). The policy implementation, however, is still insufficient. The Philippines and Singapore, on the other hand, have high performance, with the Philippines having the highest effectiveness among all countries. The result is apparent in the highest value for awareness of strength in potential human resources for content industries (Chapter 13, Table 13-1). The Singapore government strives to develop human resources. For example, the Media Development Authority Singapore has designed one pillar (out of five) in its grant scheme just for talent assistance for industry personnel (Chapter 4, Table 4-8). Although Malaysia's corresponding policy is still 'a work in progress' and Thailand's is 'planned', the countries' high performance is perhaps covered by related policy frameworks. In contrast to the Association of Southeast Asian Nations (ASEAN) countries, Japan, Korea, and China, have low levels of necessity and effectiveness, which suggests that the policy's importance is limited. Region-wide, this policy could be enhanced if countries would consider promoting exchange programmes for individuals. They should lead to sophistication and standardization of business skills, with countries compensating for each other's strengths and weaknesses. This should also contribute to mutual understanding of each other's industry and business practices, and create opportunities for expanding international relationships. In practice, the policy can be combined with or realised through co-production schemes.

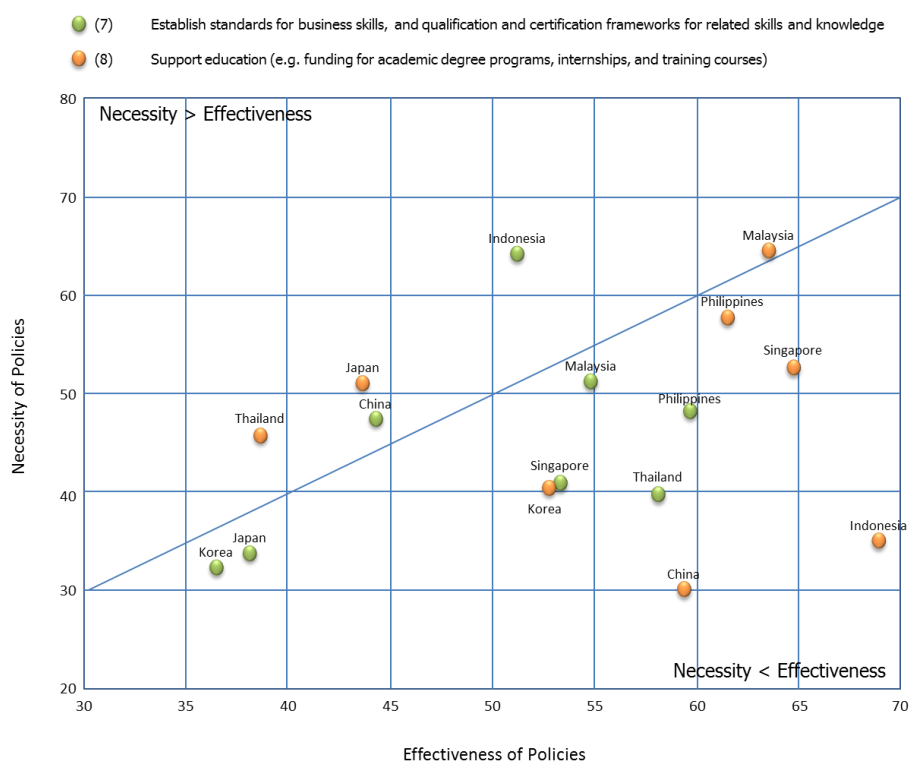
For policy #8 (Support education), most countries exhibit $E > N$, with Malaysia, the

Philippines, and Singapore having high levels of necessity and corresponding effectiveness. These countries seem to value the importance of investment in education. The result for Malaysia corresponds to its policy framework for talent, which focuses on life-long learning and awareness, targeting parents and young children. For the Philippines and Singapore, similar factors apply. Singapore has produced award-winning scholars and talents through its education programmes. Although its demand is relatively low, Indonesia sees the highest effectiveness with corresponding initiatives such as the establishment of the Hello Motion Academy. Policies supporting education require minimising the gap between academia (supply) and industry (demand). The policy can, therefore, be externally driven by creating and defining (standardising) various attractive jobs and skills on the demand side. Conversely, the quality and capacity of these components should correlate to capacity building at the education level. This implies, to a certain extent, that policy activities #7 and #8 should be considered a pair of wheels in enhancing the performance of related policies. With effective collaboration within the region, frameworks such as coherent degree programmes may provide students with higher flexibility in learning and career matchmaking.

1.5. Finance

Figure A-5 shows the evaluation of finance. It is a major issue confronting the region's content industry (see Chapter 13 for the analysis of the challenges and the strength–weakness, opportunity–threat [SWOT] matrix). Except for the evaluation of #9 (Introduce incentive schemes to encourage investments) in China and the evaluation of #10 (Establish government financing schemes to promote private financing) in Japan and Korea, further improvement is expected in these two policy activities in the countries covered.

Figure A-4: Human Resources—Evaluation of Policy Area



Source: Evaluation Survey of Content Industry Promotion Policies.

1.6. 1.6. Looking at the tendency in more detail, the countries can be roughly divided into three groups.

The first group (Malaysia and Singapore) has high level of necessity and an average level of effectiveness for both policy activities. Chapter 4 shows that Malaysia has several government financial support measures, including incentive schemes (e.g. Film in Malaysia), investment and loan schemes (e.g. My Creative Fund and Malaysia Venture Capital Management), and grant programmes (e.g. Malaysia Animation and Creative Content Center Fund). Still, expectation is higher, especially among companies and policymakers (Chapter 9, Figure 9-14). Singapore has the PSB Contestable Funds Scheme for broadcasting and five main grant schemes. Expectations for further improvement are strong among companies, while industrial organisations, academic experts, and policymakers recognise that current measures’ effectiveness matches or exceeds necessity

(Chapter 11, Figure 11-14). Thailand can be included in this group because of its high level of necessity, but effectiveness is much lower than in Malaysia and Singapore. Thailand's government is planning to implement policies in this area; when it does, recognition is expected to change (Chapter 4, Table 4-10).

The second group (Japan, Korea, and China) has a similar level of necessity of financial policies but different levels of effectiveness. In Japan and Korea, effectiveness is low for #9 and high for #10. This reflects the fact that Japan has no corresponding policy for #9 but has several funding and subsidy schemes. Korea seems to be relatively focused on financial schemes of funds or subsidies (#10) rather than incentive schemes (#9).

The third group (Indonesia and the Philippines) has lower levels of both necessity and effectiveness than other countries, a result of the awareness within the industry that governments are still at the initial stage of planning and implementing content industry policies.

Access to and availability of financial services is a major issue facing the region's content industry. To address this issue, regional efforts can, for example, provide information about existing financial support schemes provided by each government in the region and make it easier for companies to do cross-border business.

1.7. Technology

Figure A-6 shows the evaluation of technology. For policy #11 (Establish technological standards to ensure interoperability), performance is fairly positive as the level of effectiveness meets or exceeds the level of demand, although both necessity and effectiveness are low. Since some countries have not implemented corresponding policy activities, this trend may have been caused by the difficulty of assessing the effectiveness of this policy activity, or by the policy not necessarily benefiting all stakeholders. In practice, however, the fluidity of digital content depends on the accessibility and interoperability of

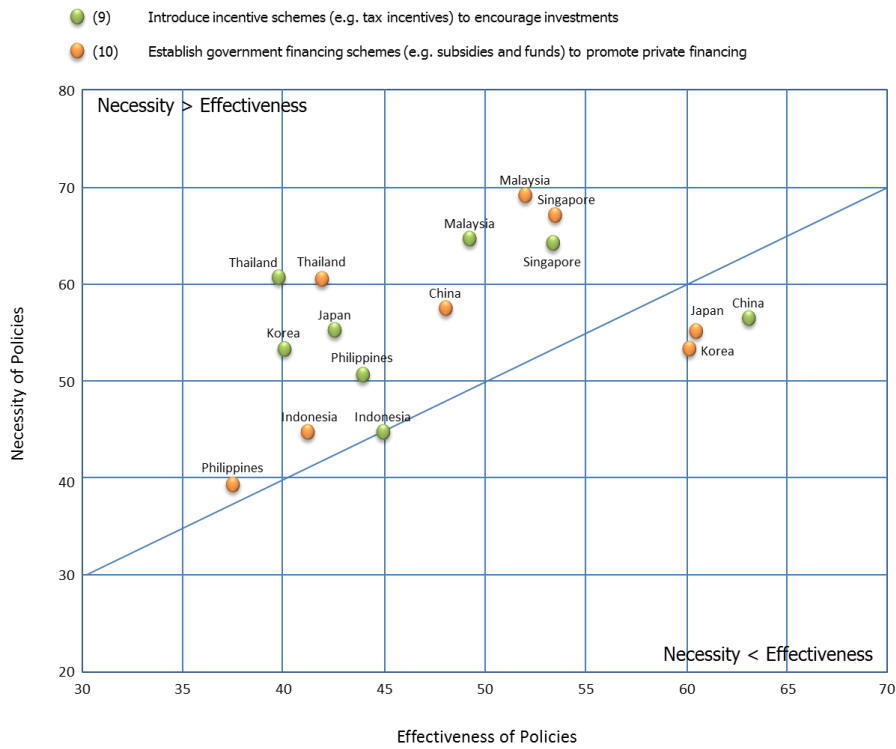
digital platforms, especially since content tends to be consumed over the Internet and in the converging industry. In addition, the supply side also benefits from improved efficiency in production and distribution of digital content. Thus, although the results show low necessity, policymakers should carefully assess the importance of the related policy for its bottom-up effect.

Policy #12 has higher level of necessity than #11, especially in Korea, Thailand, China, and Indonesia. These countries have high demand in fostering research and development and providing network infrastructure. Results for Korea and Thailand, for example, describe the intention of these countries to leverage and make use of their strength in technological infrastructure and environment, where the highest value of its awareness was observed (Chapter 13, Table 13-1). China sees a significantly higher level of effectiveness than other countries, which corresponds to the growth trend seen in the Chinese Internet and information technology sector, where numerous tech companies are entering the market with new services and increasing their international presence.

1.8. Legal Frameworks

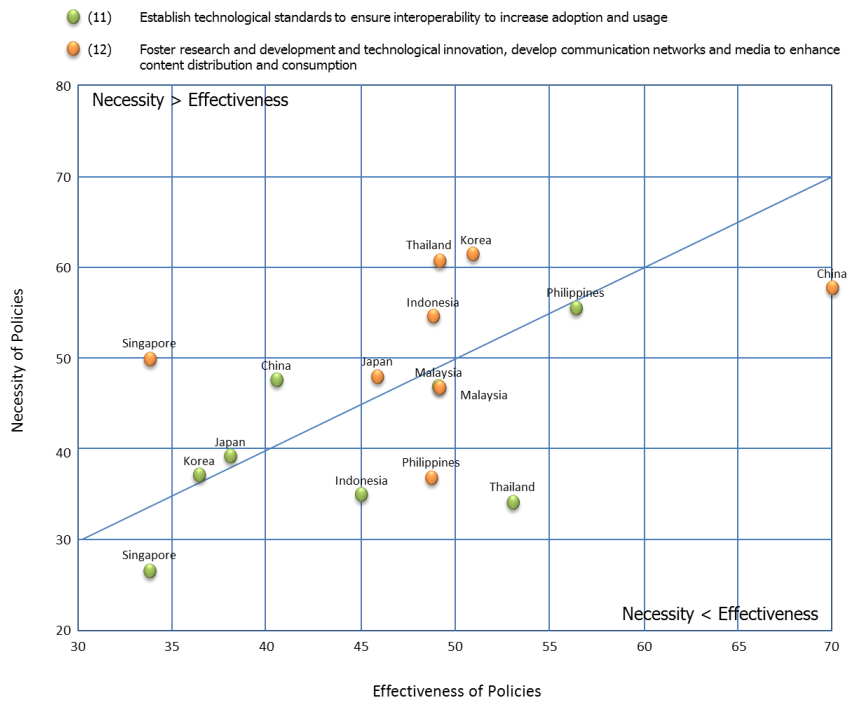
Figure A-7 shows the evaluation of legal frameworks. For policy #13 (Introduce and review regulatory frameworks for market entry, content quotas), both necessity and effectiveness are relatively low. China has high necessity, which may be the result of the industry's expectation as it is currently 'a work in progress' of policy implementation. Singapore and Thailand, $N > E$, have relatively high necessity. Korea has the highest effectiveness although its demand is limited. For policy #14 (Introduce and review intellectual property rights protection, management, anti-piracy measures), Figure A-7 shows the evaluation of introducing and reviewing intellectual property rights protection management, including anti-piracy measures.

Figure A-5: Finance—Evaluation of Policy Area



Source: Evaluation Survey of Content Industry Promotion Policies.

Figure A-6: Technology—Evaluation of Policy Area



Source: Evaluation Survey of Content Industry Promotion Policies.

Recognition of necessity is high in most countries and further improvement is expected in all countries, except the Philippines and Malaysia, even though the evaluation of current measures is not very low. Content piracy is the biggest challenge the stakeholders commonly recognise, since it prevents companies from recouping the cost of content creation and investing in the next creation. Piracy is becoming more difficult to deal with, especially in the digital environment. Although some measures can be taken by individual companies, others may require joint efforts by industry organisations or governments. Now that the content industry acknowledges that piracy is a big issue for the development of the content industry, it is essential to take a step forward to solve the problem by, for example, building networks and enhancing knowledge sharing on anti-piracy measures.

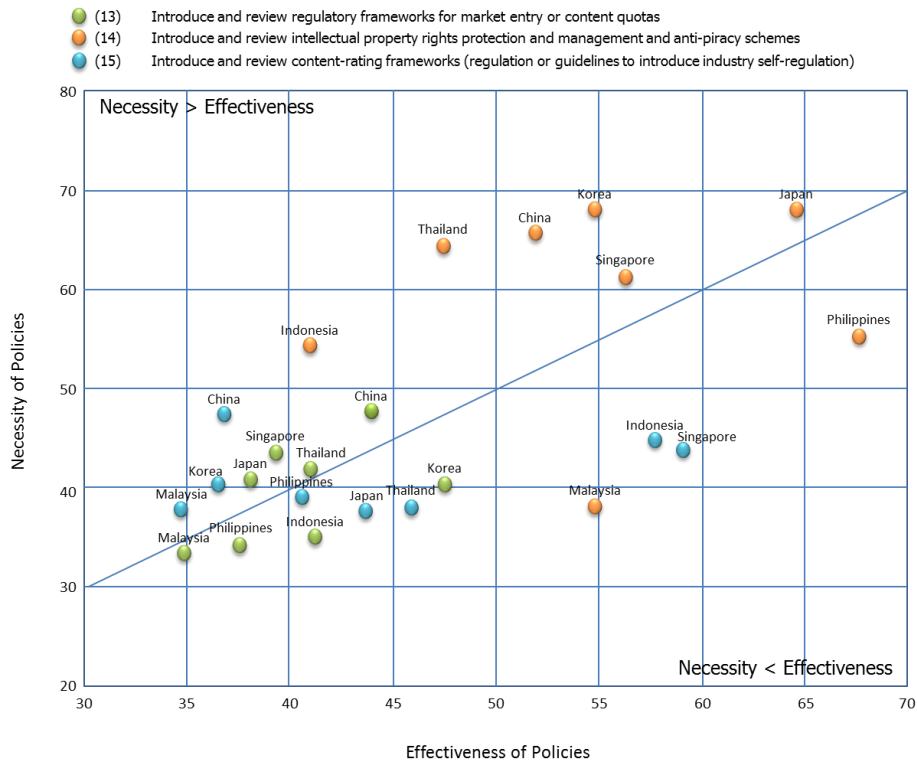
The values for policy #15 are low for both necessity and effectiveness, as they are for #13. Indonesia and Singapore show $E > N$, with high effectiveness. Policy activities in some countries (China, Malaysia, and the Philippines) are still 'a work in progress' or 'planned or under planning'.

2. Analysis of Policies

2.1. Expected Outcome and Effect of Policies

It is essential to periodically assess policy demand and the interest of industry stakeholders (including consumers), and how policies are performing and meeting the main objectives and demand. In this section, expectation of policy outcome is first explained, as it is one of the factors that drive policy demand. It is worth noting, however, that expectation is the consequence of current policy implementation. Figure A-8 shows the results. Overall, respondents expect direct effects in terms of increased revenues and business opportunities. Only the Philippines has higher results for business opportunities. Each country also has unique expectations of the policies, which generally vary in terms of industry development.

Figure A-7: Legal Frameworks—Evaluation of Policy Area



Source: Evaluation Survey of Content Industry Promotion Policies.

For example, developed countries (Group 1) have lower expectations or demands regarding improvement in product quality. The majority of respondents in Singapore and Malaysia (Group 2) and the Philippines expect effects in that area. These three countries and Thailand have high results in increase in investment and financial sponsorship, which match the results in Section 1.5.

Figures A-9 and A-10 indicate the effects of each policy, based on the percentage of respondents. For policies on industry promotion, the majority of respondents consider them effective in increasing revenues and/or business opportunities. For policies on business relationships, more respondents consider them to have effects on increase in business opportunities and networking. For policies on human resources, finance, technology, and legal frameworks, many respondents consider them to have effects on improvement in various fields such as business opportunities, quality of products, and

capability of businesses. Table A-1 aggregates these results and maps the relationship between each policy and its effects. The contributions of each policy activity are summarised below:

- Policy activities #1–7 and 10 induce expansion in business opportunities.⁶
- Policy activities #7–12 contribute to raising quality and ability necessary for business operation and management.⁷
- Policy activities #1, 2, 4, 10, 12, and 15 (especially #12) contribute to increase in revenue.⁸ Policy #12 is considered important by all the countries (Section 1.6).
- Policy activities #13–15 contribute to decreasing the risks in the content business.⁹

⁶ (1) Communicate industrial development visions and master plans and provide relevant statistics for benchmarking

(2) Stimulate establishment of industrial clusters, promote market development that spur content demand, foster new business models

(3) Support industry-led organisations to aggregate industrial interests and/or functions

(4) Support building of business relationships

(5) Establish international agreements

(6) Promote brands and campaigns, host or support participation in international trade events and meetings

(7) Establish standards for business skills, qualification and certification frameworks for related skills and knowledge

(10) Establish government financing schemes to promote private financing

⁷ (7) Establish standards for business skills, qualification and certification frameworks for related skills and knowledge

(8) Support education

(9) Introduce incentive schemes to encourage investments

(10) Establish government financing schemes to promote private financing

(11) Establish technological standards to ensure interoperability to increase adoption and usage

(12) Foster research and development and technological innovation, develop communication networks and media to enhance distribution and consumption of content products

⁸ (1) Communicate industrial development visions and master plans and provide relevant statistics for benchmarking

(2) Stimulate establishment of industrial clusters, promote market development that spur content demand, foster new business models

(4) Support building of business relationships

(12) Foster research and development and technological innovation, develop communication networks and media to enhance distribution and consumption of content products

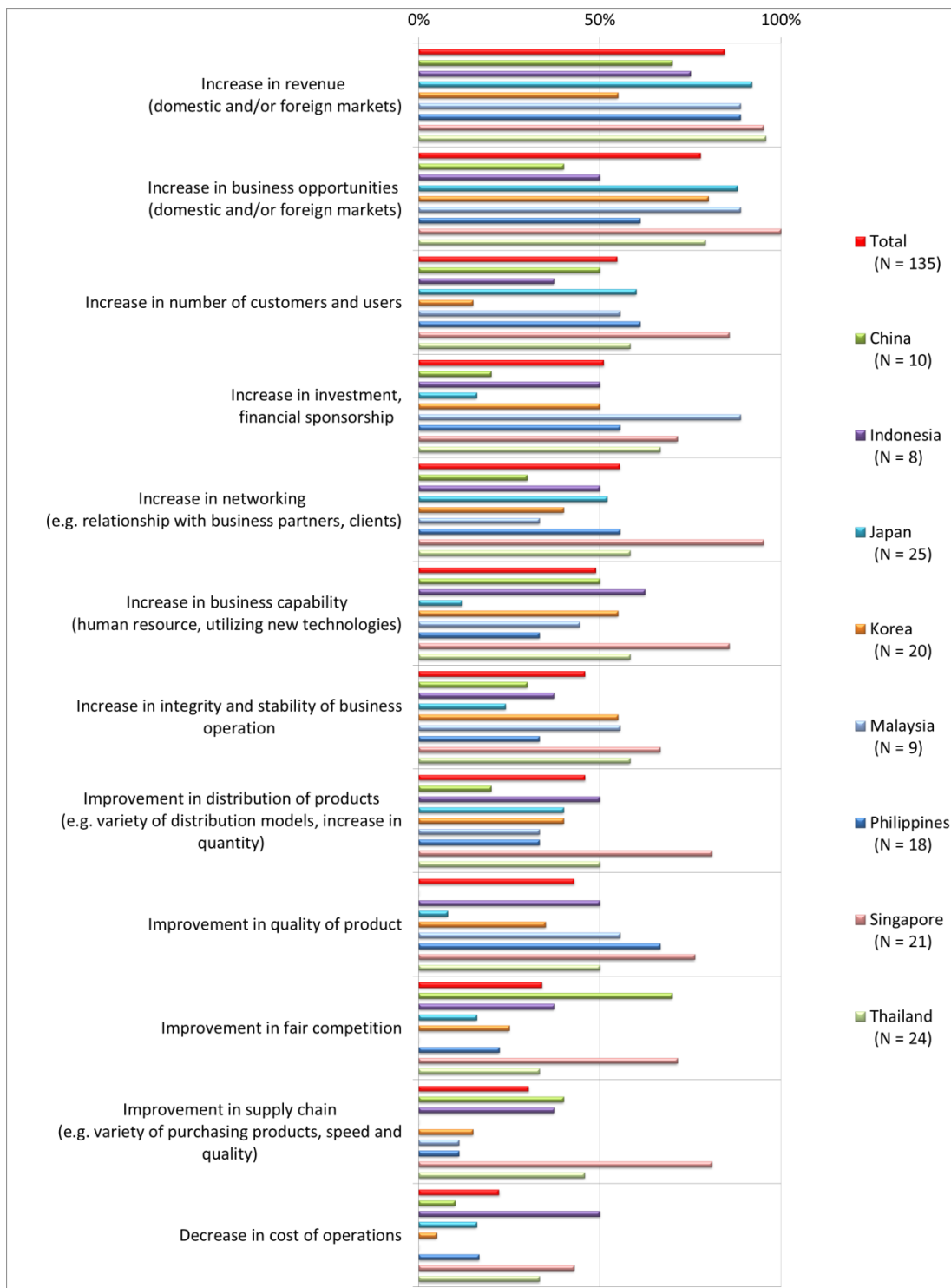
(15) Introduce and review content-rating framework

⁹ (13) Introduce and review regulatory frameworks for market entry, content quotas

(14) Introduce and review intellectual property rights protection and management and anti-piracy schemes

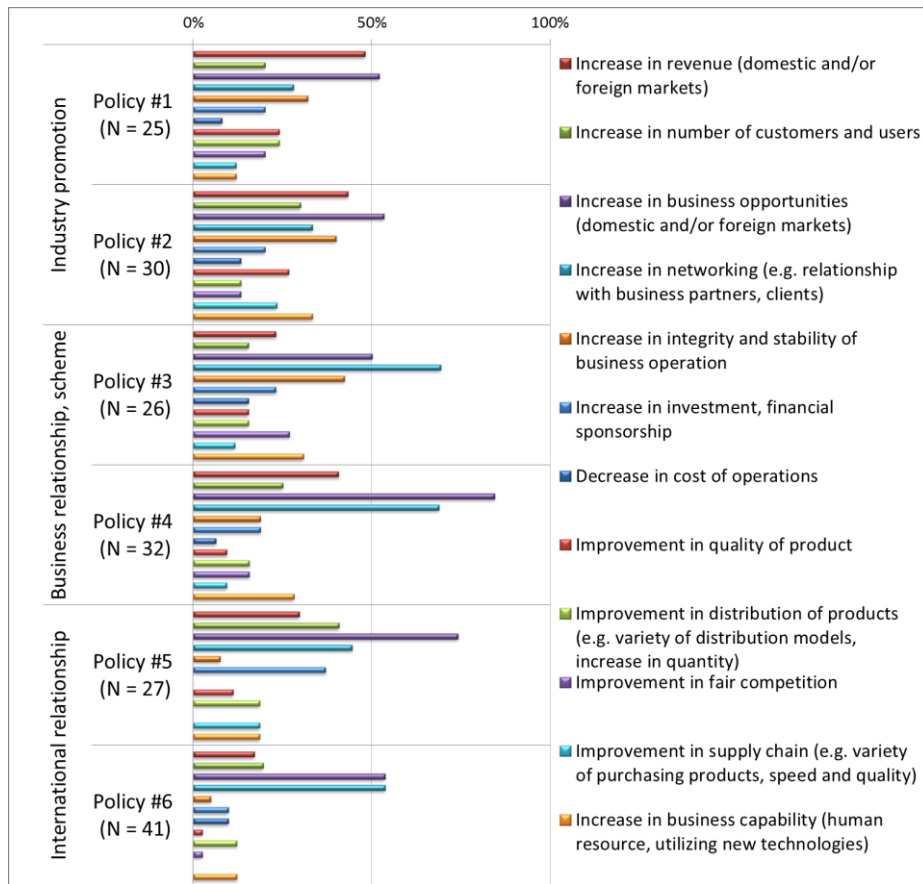
(15) Introduce and review content-rating framework

Figure A-8: Expected Outcomes of the Policies



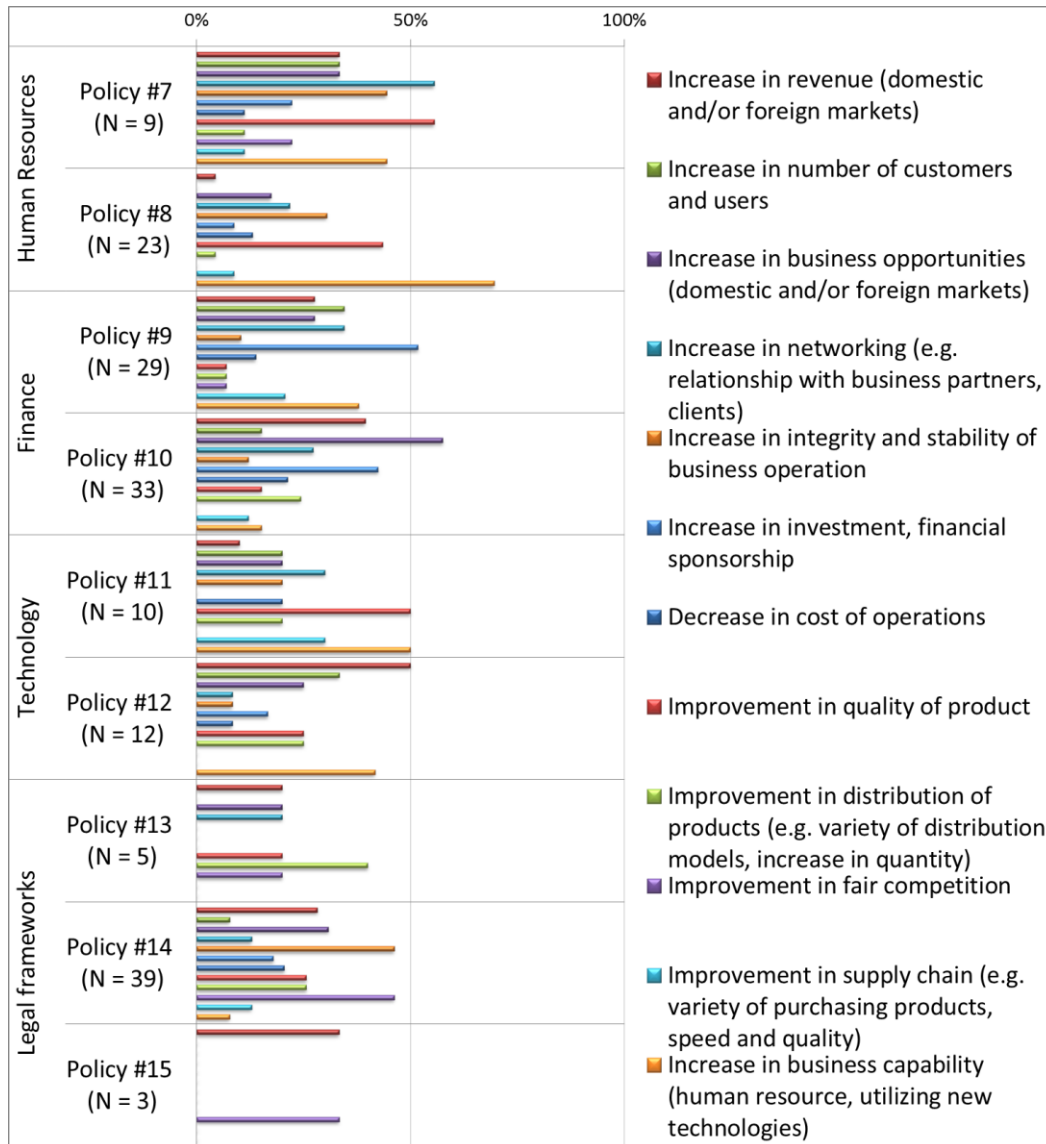
Source: Evaluation Survey of Content Industry Promotion Policies.

Figure A-9: Effects of Each Policy—All Member Countries
Policy objective: To promote the content industry and market development



Source: Evaluation Survey of Content Industry Promotion Policies.

Figure A-10: Effects of Each Policy (All Member Countries)
Policy objective: To provide the basic infrastructure and promote competitiveness of content business and creation



Source: Evaluation Survey of Content Industry Promotion Policies.

Table A-1: Relationship between Policy Area and Activity and Effect

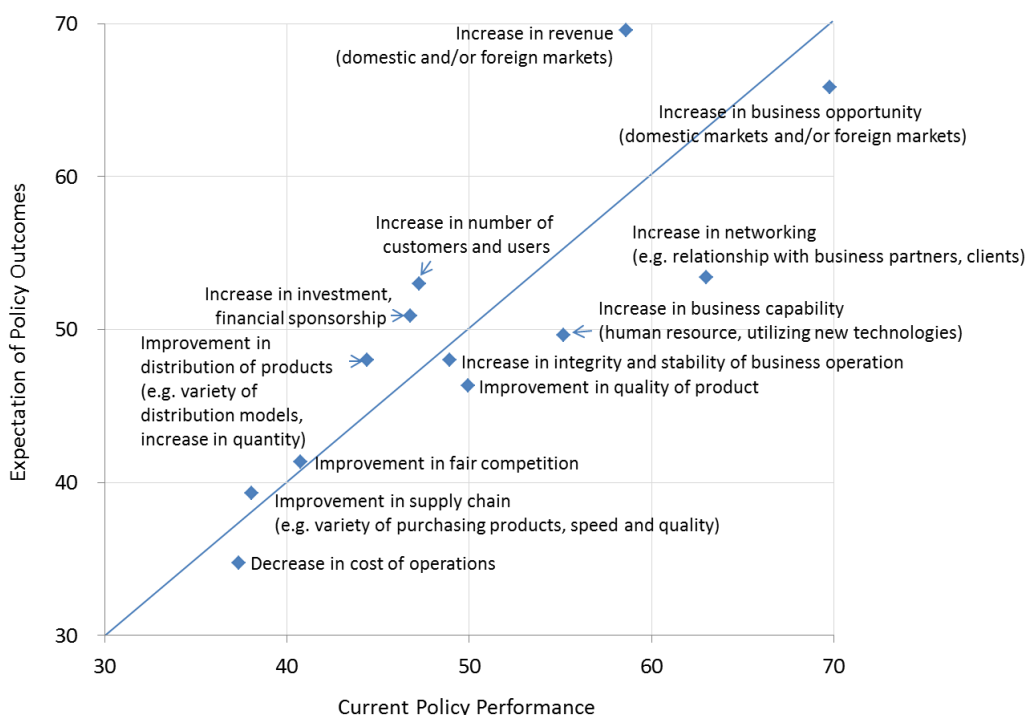
<i>Effect</i>	<i>Policy Activity</i>		To promote the content industry and market development						To provide the basic infrastructure and promote competitiveness of content business and creation						
			Industry promotion		Business relationships, scheme		International relationships		Human Resources		Finance		Technology		Legal frameworks
	#1	#2	#3	#4	#5	#6	#7	#8	#9	#10	#11	#12	#13	#14	#15
Increase in revenue	2	2		3						3		1			1
Increase in number of customers and users					3										
Increase in business opportunities	1	1	2	1	1	1				1					
Increase in networking			1	2	2	1	1								
Increase in integrity and stability of business operation		3	3											1	
Increase in investment, financial sponsorship					4				1						
Decrease in cost of operations															
Improvement in quality of product							1	2		2	1				
Improvement in distribution of products													1		
Improvement in fair competition														1	1
Improvement in supply chain															
Increase in business capability								1	3		1	3			
			≥ 50%												
			< 50%												

* The figures describe the number of policies that correspond to each effect (derived from Figures A-9 and A-10). '1' means the effect has highest number of votes and '2' the second highest.

Source: Evaluation Survey of Content Industry Promotion Policies.

Figure A-11 shows the relationship between current performance (horizontal axis) and expectation of policy outcomes (vertical axis), combining the results of previous sections. The figures are converted into deviation values. Note that mean average of the 15 policy activities is utilised for quantifying the current performance of policies. For the elements in the right-hand area (increase in business opportunities, networking, business capability, etc.), current performance exceeds expected outcomes, which means that the policies have a positive impact correspondent to demand. Elements in the left-hand area (increase in revenue, increase in number of customers and users, and increase in investment and financial sponsorship) have high values in terms of expectation, although current performance still needs improvement. These elements are important to develop the content business and to maximise the effects of policy activities #5, #9, #12, and #13 (Table A-1).

Figure A-11: Relationship between Current Performance and Expectation of Policy Outcomes



Source: Evaluation Survey of Content Industry Promotion Policies.

2.2. Key Success Factors of Policy Implementation

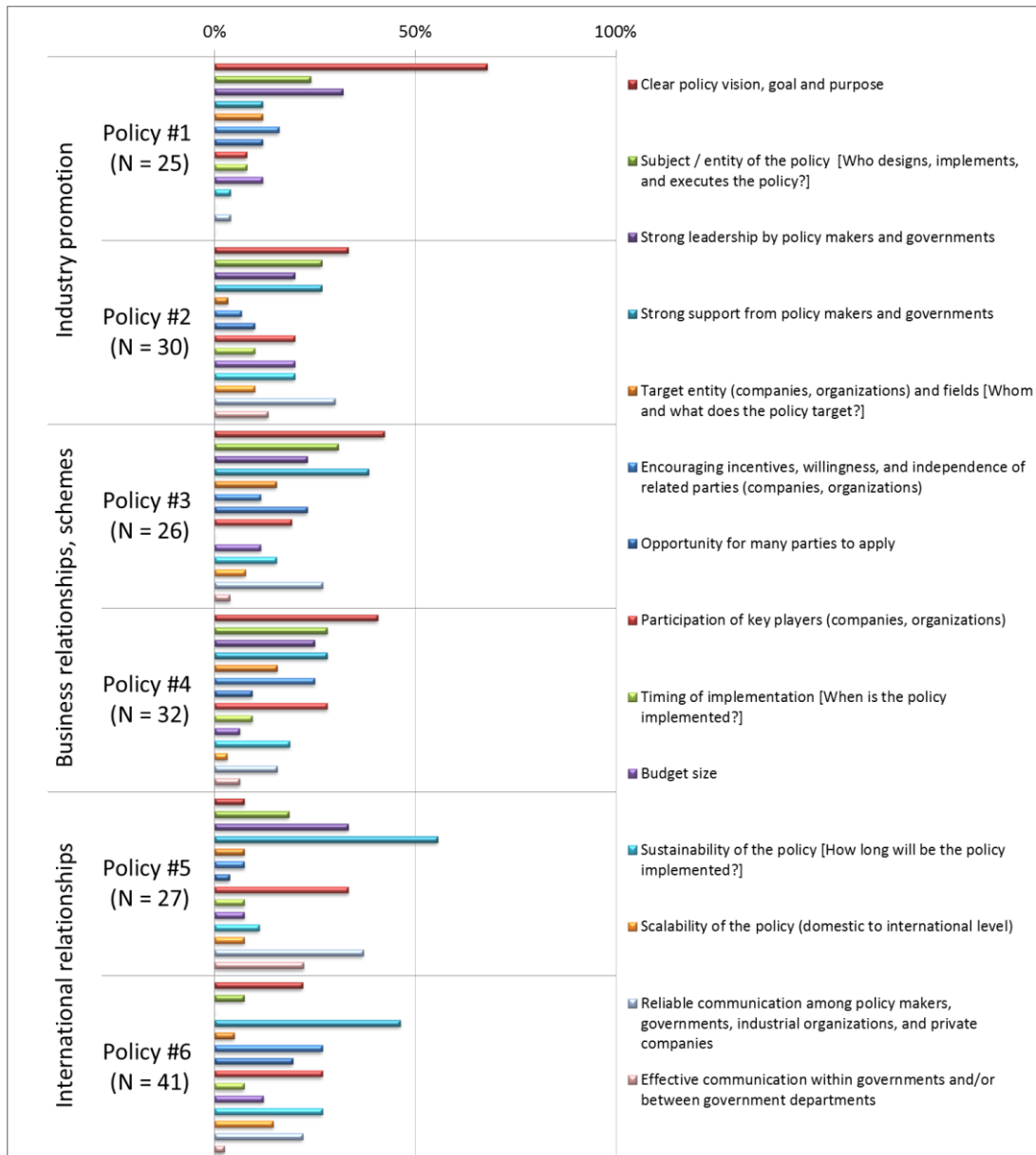
Figures A-12 and A-13 indicate what respondents consider the key success factor (KSF) for each policy.

Each high-priority policy has different perspectives on KSFs. Policy #1 (Communicate industrial development visions, master plans, statistics) is mostly driven by a clear policy vision, goal, and purpose. Policy #5 (Establish international agreements) is driven by strong support from policymakers and government. Policy #9 (Introduce incentive schemes to encourage investments) seems not to have a significant factor (at least not within the hypothesis of the research) and is, therefore, considered relatively difficult to deal with by industry and government. Policy #10 (Establish government financing schemes to promote private financing) has a similar issue, although strong government support is essential. Policy #14 (Introduce and review intellectual property rights protection and management, anti-piracy measures) has different perspectives, where reliable communication among policymakers, government, industrial organisations, and private companies is also important. This can be applied to mutual collaboration among countries to improve and enjoy a scale effect on overall performance in the region.

Table A-2 aggregates these results and maps the relationships between policy area and activity and KSF. The top three KSFs are (1) strong support from policymakers and government; (2) clear policy vision, goal, and purpose; and (3) reliable communication among stakeholders. Some policies require a clear definition of target entity, leadership of key players, or budget size. Strong government leadership was not considered a KSF.

Figure A-12: Key Success Factors of Policies—All Member Countries

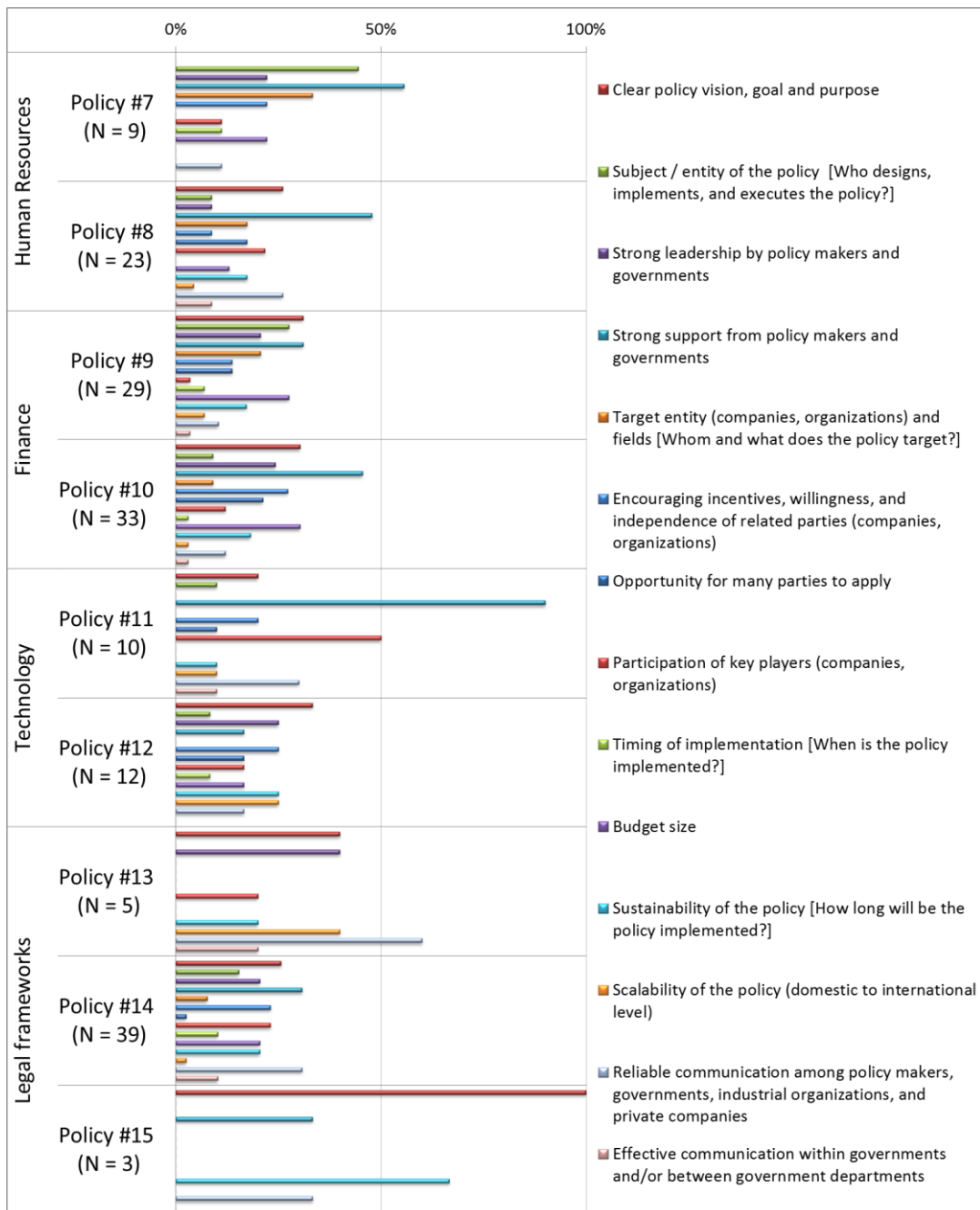
Policy objective: To provide the basic infrastructure for and promote competitiveness of content business and creation



Source: Evaluation Survey of Content Industry Promotion Policies.

Figure A-13: Key Success Factors of Policies—All Member Countries

Policy objective: To promote the content industry and market development



Source: Evaluation Survey of Content Industry Promotion Policies.

Table A-2: Relationship between Policy Area and Activity and Key Success Factor

<i>Key Success Factor</i>	<i>Policy Activity</i>				To promote the content industry and market development						To provide the basic infrastructure and promote competitiveness of content business and creation					
	Industry promotion		Business relationships, scheme		International relationships		Human Resources		Finance		Technology		Legal frameworks			
	#1	#2	#3	#4	#5	#6	#7	#8	#9	#10	#11	#12	#13	#14	#15	
Clear policy vision, goal and purpose	1	1	1	1				2	1	2		1	2		1	
Subject / entity of the policy		3					2									
Strong leadership by policy makers and governments					3								2			
Strong support from policy makers and governments		3	2		1	1	1	1	1	1	1			1		
Target entity and fields							3									
Increase in investment, financial sponsorship																
Encouraging incentives, willingness, and independence of related parties																
Opportunity for many parties to apply																
Participation of key players					3							2				
Timing of implementation																
Budget size									3	2						
Sustainability of the policy															2	
Scalability of the policy													2			
Reliable communication among policy makers, governments, industrial organizations, and private companies		2			2		2						1	1		
Effective communication within governments and/or between government departments																

>= 50%

< 50%

* The figures describe the number of policies that correspond to each component of the key success factors (KSFs) (derived from Figures A-12 and A-13). '1' means the KSF has the highest number of votes and '2' the second highest.

Source: Evaluation Survey of Content Industry Promotion Policies.

2. Details of the Policy Recommendation

This section describes the details of the recommendation of the 'Study on the Development Potential of the Content Industry in East Asia and ASEAN Region' (FY2012 Recommendation).

1. Promote collaboration to enhance the content industry in each member country

- The growth of the content industry in each member country and in the region requires mutual cooperation and collaboration among countries. Implementation of the following activities should be considered:
 - (1) Exert continuous effort to provide collaboration opportunities (G–G, G–P, and P–P, where G stands for government and P, for private sector).
 - Continuous effort is required to create opportunities for collaboration between government and the private sector in each country. Holding regular meetings for both sectors is an effective method for sharing information and exchanging opinions among member countries.
 - Through meetings, participants are welcome to propose areas for collaboration, such as particular joint projects.
 - (2) Standardise the framework and tools for quantitative assessment, such as statistics relating to the content industry.
 - A common regional and global statistical framework defining the content industry market size and labour force is limited. Instead, each country has its own unique framework.
 - To promote the content industry in the region, it is important to standardise the statistical framework for market size and labour force in member countries. Once this is achieved, the following advantages are expected: the availability of cross-country comparison for market analysis and the

evaluation of economic effectiveness, the facility of comparing results of joint projects in each member country, and so on.

- In the FY2012 project, the market size of the audiovisual content industry in each member country was estimated using a common statistical framework. This approach is expected to be continued and may be revised if necessary.

(3) Enhance a cooperative promotion policy for international co-production (bilateral and multilateral).

- International co-production is an opportunity for participating countries to see the growth of human development and companies and to facilitate distribution of content created in each member country. It is, therefore, significant for the growth of the region's content industry.
- To promote international co-production, a major activity is strengthening policy measures through mutual cooperation among member countries. Exchanging opinions and holding negotiations for this purpose through meetings listed in (1) are expected.

(4) Standardise regulations and policy measures (e.g. rules and customs related to international co-production)

- Regulations or promotion policies for the content industry in each member country are expected to be standardised and strengthened in terms of mutual cooperation. For example, co-production can be facilitated by standardising rules and customs related to international co-production and by reducing procedures and tasks in practical activities for co-production.

2. Reinforce principal factors in each country's content industry

- A set of policies for content industry promotion in each member country has

been proposed. The policies are divided into four categories (2.1–2.4).

- The main purposes are to expand the base of the entire content industry, raise its standards, improve the market environment, create new markets, and expand existing markets.

2.1 Develop human resources

- The value of the content industry is created by human resources. Therefore, developing and strengthening human resources are most important for the industry's growth.

(1) Support the discovery and training of talented people

- Most important to the content industry is finding talents and nourishing them. Most content companies, however, especially those that create content themselves, are relatively small, and finding talents and giving them educational opportunities tend to be a burden.
- It is, therefore, important to implement policy measures to support finding and nourishing talents. Through various approaches, it is essential to adopt arrangements suited to conditions in each member country.

(2) Support job creation in the media and content industries

- Hiring highly skilled and talented personnel is difficult because the content industry has many small enterprises where employment is not always stable and secure.
- A key factor in creating content industry jobs is government demand and subsidy.

(3) Develop training programmes to fill supply and demand gaps between academia and industry

- Although a small number of academic institutes provide programmes for the content industry, they do not always match its needs.
- On the other hand, since human development and educational programmes in private companies are often based on on-the-job training, the content and level of education may vary depending on which industry or company the talent works for. Some talents do not receive the educational opportunities needed to realise their potential skills.
- In either case, not enough talents with adequate abilities and skills can be supplied to fill the gap between demand and supply.
- The difficulty of evaluating abilities and skills based on curriculum vitae alone also leads to the demand and supply gap.
- By developing appropriate educational programmes and opening them to the public, the number of talents with the abilities and skills to match the industry's demand is expected to increase.

(4) Deregulate personnel exchange and visa regulations and simplify procedures

- To encourage regional co-production and improve the mobility of human resources, rules and procedures related to personnel transfer and exchange (immigration) must be simplified.

2.2 Promote business

- To strengthen and stabilise the content industry, private companies must be supported. Since the content industry is composed mainly of small and medium-sized enterprises (SMEs), supporting content companies is an effective way to strengthen SMEs in general.
- Specifically, when a single company cannot handle certain issues, government support is extremely important.

- Creating a business environment that reduces limitations on SMEs will promote and stabilise the content industry.
- (1) Establish and improve funding schemes (e.g. introduce incentive schemes for domestic and international funding)
- Since most content companies are SMEs, investing in a single company is relatively high risk, and evaluating the content itself is difficult so it is not easy to raise funds.
 - By creating or improving fundraising schemes, the government will make it easier for content companies to raise funds. The government should also introduce a variety of systems that include private sector and other countries' schemes.
- (2) Jointly provide resources to localise content (e.g. share information on companies, price lists, and evaluation)
- When producing, exporting, or commercialising content in foreign countries, 'localising' or adjusting it to export destinations is inevitable. Specifically, content should be translated, edited, or modified to meet the needs of the receiving cultures.
 - Although often performed outside the content producer's country, these tasks cost more time and money than necessary due to the lack of information on reliable foreign operators, business customs, and so on.
 - To localise content efficiently, members should share information on operators, fees, and evaluations.
- (3) Promote international co-production
- Most companies hardly participate in international co-production. It will give

companies opportunities to achieve more. They will benefit from meeting highly creative and skilled companies. Such arrangements will increase business or market innovations or even expand the scale of operations.

- It is, therefore, vital to promote international co-production that SMEs can join. Providing support for smooth co-production is also ideal.

2.3 Expand content trading

- Domestic market growth and expansion of regional trade are essential.
- The region's content market consists of a variety of countries and markets. Some countries wish to expand exports whereas some have large potential markets but suffer lack of supply. Others have good relationships with foreign partners that lead to or stimulate the growth of domestic industries and markets. If these countries want their own markets to grow, expanding and promoting regional content trade is critical. Complementing insufficient domestic supply and demand with foreign trade will lead to mutual growth.
- Standardisation of the intellectual property rights system, joint measures against piracy, and deregulation of import restrictions on legal content are required.

(1) Create a common intellectual property rights system

- An intellectual property rights system, including copyrights and trademarks, that varies from nation to nation will hinder regional transactions and distribution. At the minimum, member countries should consider standardisation and interoperability.

(2) Joint measures against piracy

- Anti-piracy measures are vital for the healthy development of the content

industry. Online piracy, in particular, is so pervasive that international cooperation is essential to combat cross-border intellectual property infringement.

- Along with creating a mechanism for immediate exchange and sharing of information on piracy, establishing a law enforcement network is fundamental.

(3) Deregulate imports of legal content

- Some countries set a quota on the distribution of foreign-made products in the domestic market, based on the amount of foreign content, to protect the countries' cultures and content industries. Such regulations exist not only in the region but also in Europe and elsewhere.
- Such regulations, on the other hand, suppress regional content trade. If expanding trade is essential for the growth of the regional content industry, relaxing regulations is critical.

2.4 Use new technologies effectively

- The content industry is based not only on creativity but also on new technologies. Content market development is expected to continue, and the Internet, its services and platforms, the diffusion of smartphones and wearable devices, 3D, 4K/8K, AR (augmented reality), and so on are expected to create new markets.
- On the other hand, new technologies can rapidly and profoundly change the market order. However, from a consumer's perspective, negative impact caused by these changes should be prevented.
- Policies that make the best use of new technologies, while paying attention to their effects and influence on the market, are significant.

- (1) Provide opportunities for information sharing and exchange of ideas among governments and business operators of each country
 - To promote innovative services and the creation of new markets and also to prevent market distortion due to rapid market changes, it is essential to collect and share information on trends in emerging technologies and new services based on them.
- (2) Promote international standardisation of new technologies
 - Standardisation is important to make the best use of new technologies and widen the market. With the globalisation of distribution and the growth of the Internet, the international expansion of content trade and the promotion of global standardisation early on is critical. Sharing information and taking action, if necessary, for standardisation is expected to be considered.

3. 3. Survey Questionnaire

Basic Information on Implementing Questionnaire Survey is shown as below.

- **Implementation Period**
 - ✓ From 28 December 2013 to 14 April 2014
 - ✓ Implementation period from the start until the end of the questionnaire survey depended on each member country.
- **Language Selections**
 - ✓ English (original), Chinese, Indonesian, Japanese, Korean, Thai
 - ✓ Prospective respondents could select one of six languages.
- **Implementation Method**
 - ✓ Each member country could select digital file format, web-based questionnaire and hand-written format, or multiple formats.

Country	Format
China	Digital file format and web-based questionnaire
Indonesia	Hand-written format and web-based questionnaire
Japan	Hand-written format and web-based questionnaire
Korea	Digital file format and web-based questionnaire
Malaysia	Web-based questionnaire
Philippines	Web-based questionnaire
Singapore	Web-based questionnaire
Thailand	Digital file format, and hand-written format and web-based questionnaire

- **Questionnaire**

- ✓ Digital file format and hand-written format are shown in the next pages.

**Evaluation Survey of Content Industry Promotion Policies
-Background and Objectives-**

Background

- The Asian content industry and market is continuously seeing a high growth, and is expected to be one of the important regions in a global perspective. In order to foster the potential and to promote its development, it is essential to consider and implement governmental initiatives and policies domestically, and also to collaborate among countries in this region.
- Mitsubishi Research Institute (Tokyo, Japan) was appointed by ERIA (Economic Research Institute for ASEAN and East Asia) to conduct a research on the development potential of the content industry in East Asia and ASEAN region, collaborating with governmental representatives from eight countries* (Hereinafter referred to as 'ERIA research project').

* China, Indonesia, Japan, Korea (South Korea), Malaysia, Philippines, Singapore, Thailand

Objectives of this questionnaire

- This questionnaire survey is intended to evaluate current policies implemented in each country, and to discover policy needs and demands which would further foster its development domestically and regionally. The result of the survey would be analysed to prioritise current and future policies, as well as to look at the KFS (Key Factor for Success) and the challenges of implementation.

*For the sake of recognition, here content industry refers to areas in TV broadcasting, Animation, Film, Music, and Games.

Target respondents

- This questionnaire is addressed to various business entities engaged in content business, industrial organisations, as well as policymakers promoting and/or regulating the content industry, in each member country of the ERIA research project. To facilitate the process of answering the questionnaire and to get as broad and detailed picture as possible, we encourage you to coordinate responses from different sections within your organisation.

Format and guidance

- The questionnaire offers a 'tick-the-box' format as well as a set of open questions and possibilities for comments. While the tick-the-box format is intended for speedy completion and help quantitative analysis, the open questions and comments reflect the potential perspective of the subject area.

Outcome of the survey

- The findings of the survey will be analysed and discussed in the ERIA research project meetings. Based on the findings, discussions, and additional work by the secretariat, a report will be published on behalf of ERIA. The report will address policy recommendations for policymakers as well as for the industry, which should provide certain guidance in promoting the content industry.

<Business Respondents>

Chapter 1. About your organisation / business					
<i>For the sake of recognition, here content industry refers to areas in TV broadcasting, Animation, Film, Music, and Games.</i>					
Name of your organisation / department					
1-1 Please select your country. [Select one]					
<input type="checkbox"/> China	<input type="checkbox"/> Indonesia	<input type="checkbox"/> Japan	<input type="checkbox"/> Malaysia		
<input type="checkbox"/> Singapore	<input type="checkbox"/> South Korea	<input type="checkbox"/> Philippines	<input type="checkbox"/> Thailand		
1-2 What is your company's main business, in particular the final type product of content? [Select all that apply]					
<input type="checkbox"/> TV programme	<input type="checkbox"/> Film	<input type="checkbox"/> Animation	<input type="checkbox"/> Games	<input type="checkbox"/> Music	<input type="checkbox"/> Others (_____)
1-3 What is your company's main operation in terms of value chain? [Select all that apply]					
<input type="checkbox"/> Production	<input type="checkbox"/> Post production				
<input type="checkbox"/> Broadcasting	<input type="checkbox"/> Distribution (mainly B to B process)				
<input type="checkbox"/> Sales (mainly B to C process) *	<input type="checkbox"/> Purchase/Aggregation				
<input type="checkbox"/> Manufacturing*	<input type="checkbox"/> Others (_____)				
* includes sales / manufacturing of related products (e.g. licensed character goods)					
1-4 Please select your regional (market) footprint, including export, licensing, business operation, etc. [Select all that apply]					
<input type="checkbox"/> Domestic (no oversea operation)	Select Country	<input type="checkbox"/> China			
<input type="checkbox"/> Asia		<input type="checkbox"/> Indonesia			
<input type="checkbox"/> North America		<input type="checkbox"/> Japan			
<input type="checkbox"/> South & Central America		<input type="checkbox"/> Malaysia			
<input type="checkbox"/> Middle East		<input type="checkbox"/> Singapore			
<input type="checkbox"/> Europe		<input type="checkbox"/> South Korea			
<input type="checkbox"/> Africa		<input type="checkbox"/> Philippines			
<input type="checkbox"/> Others ()		<input type="checkbox"/> Thailand			
		<input type="checkbox"/> Others ()			

1-5 Please provide with basic information of your organisation						
(1) Annual turnover for FY 2012, or the latest (Consolidated)	<input type="checkbox"/> <\$500k	<input type="checkbox"/> \$501k-\$10m	<input type="checkbox"/> \$11m-\$100m	<input type="checkbox"/> \$101m-\$1000m	<input type="checkbox"/> >\$1000m	
(2) Number of employees (Consolidated)	<input type="checkbox"/> <50	<input type="checkbox"/> 51-100	<input type="checkbox"/> 101-500	<input type="checkbox"/> 501-1000	<input type="checkbox"/> >1000	

Chapter 2. Current status of the content industry in your country					
2-1 How would you assess the condition (Strength and Weakness) in the content industry in your country? Please answer for each of the item [(1) – (10)].					
[Select one for each item]					
Item	Very weak	weak	Moderate	Strong	Very Strong
(1) Ability and skill to create content products (e.g. creating attractive ideas, creating high quality content, modelling business for specific product and services)	1	2	3	4	5
(2) Ability to sell content products (e.g. existence of strong and reliable distribution market, diversity in business models, access to relevant market and overseas)	1	2	3	4	5
(3) Overall market conditions (e.g. existence of high value added markets, ideal competitive environment, level of quality/literacy of consumers)	1	2	3	4	5
(4) Potential domestic content market size (e.g. effective market population, positive correlation with GDP growth)	1	2	3	4	5
(5) Accessibility and availability to financial services (e.g. loans and investments, private fund and capitals, sponsorship)	1	2	3	4	5
(6) Relationships with foreign countries <i>*not specific to certain country</i> (e.g. linkage between countries through languages/cultures/religions, existence of economic partnership such as FTAs)	1	2	3	4	5
(7) Technological infrastructure and environment for consumers to access variety of content (e.g. coverage and penetration of communication and media infrastructure, services, distribution networks)	1	2	3	4	5
(8) Potential human resource for content industries (e.g. effective educational programmes and systems for human resource development, carrier path for talents in the industry, programmes for introducing new technologies)	1	2	3	4	5
(9) Relationships with other industries to produce diversity of	1	2	3	4	5

related products (e.g. existence of reliable manufacturers, distributors, service providers)					
(10) Governmental promotion policies (e.g. various and effective measures to promote the industry development)	1	2	3	4	5

2-2 What are the challenges, the content industry in your country/your business is currently facing?

External issues (Market/industry perspective)	<input type="checkbox"/> Lack of fund, financial support
	<input type="checkbox"/> Increase in cost of operation (including cost of labour)
	<input type="checkbox"/> Price reduction of products
	<input type="checkbox"/> Lack of business matching opportunities
	<input type="checkbox"/> Spread of piracy contents (need of content protection mechanism)
	<input type="checkbox"/> Adapting to new business models and technologies
	<input type="checkbox"/> Others (_____)
Internal issues (Business entity perspective)	<input type="checkbox"/> Lack of market information (consumers, suppliers, etc.)
	<input type="checkbox"/> Insufficient labour force (quality and/or quantity)
	<input type="checkbox"/> Insufficient use of new technologies
	<input type="checkbox"/> Insufficient knowledge of oversea promotion
	<input type="checkbox"/> Insufficient knowledge of oversea promotion, international business
	<input type="checkbox"/> Insufficient relationship with reliable business partners
	<input type="checkbox"/> Others (_____)

2-3 What do you consider are the future challenges regarding content industry/business development (domestically, regionally, and internationally)? [Please comment]

Chapter 3. Evaluation of the current policy for content industry promotion

[In this section, please refer to the 'Policy categorisation table']

3-1 Are you aware of the current policies or programmes that are implemented in your country, related to each policy? In case one current policy or initiative falls under several items in the list, please select all.

Policy	[Select one for each policy]	
	1. Yes, I am aware of the policies implemented in our country	2. No, I am not aware of any policies implemented in our country
(1)	<input type="checkbox"/>	<input type="checkbox"/>
(2)	<input type="checkbox"/>	<input type="checkbox"/>
(3)	<input type="checkbox"/>	<input type="checkbox"/>
:	<input type="checkbox"/>	<input type="checkbox"/>

3-2 In general, policies and programmes are planned and implemented with expectation to produce good effects.

In that sense, what is your current assessment regarding the result of the policy? Do you consider the policies have achieved expected objectives effectively?

Policy*	[Select one for each policy]		
	1. It does not seem effective as expected	2. It seems effective as expected	3. It seems more effective than expected
(1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**On the web-based questionnaire, respondents will only answer to the policies that they are aware of (From question 3-1)*

3-3 What kind of effects/outcomes have you recognised in your business as a result of each policy?

Please select the top 3 policies which you consider had the most effectiveness.

Policy*		[Select all that apply for each policy]
(1)	<input type="checkbox"/>	Increase in revenue, market share (domestic markets and/or foreign markets)
	<input type="checkbox"/>	Increase in number of customers/users (market share)
	<input type="checkbox"/>	Increase in business opportunity (domestic markets and/or foreign markets)
	<input type="checkbox"/>	Increase in networking (e.g. relationship with business partners, clients)
	<input type="checkbox"/>	Increase in integrity and stability of business operation
	<input type="checkbox"/>	Increase in investment, financial sponsorship
	<input type="checkbox"/>	Decrease in cost of operation
	<input type="checkbox"/>	Improvement in quality of product
	<input type="checkbox"/>	Improvement in distribution of product (e.g. variety of distribution models, increase in quantity)
	<input type="checkbox"/>	Improvement in fair competition
	<input type="checkbox"/>	Improvement in supply chain (e.g. variety of purchasing products, speed and quality)
	<input type="checkbox"/>	Increase in capability of business (human resource, utilising new technologies)
<input type="checkbox"/>	Others/unexpected effects ()	

3-4 What do you consider the most important element (key success factor) for improving the effectiveness of each policy? Please select the top 3 policies which you consider had the most effectiveness.

Policy*		[Select all that apply for each policy]
(1)	<input type="checkbox"/>	Subject/entity (Who)
	<input type="checkbox"/>	Target entity (companies, organisations) and fields (Whom/Where)
	<input type="checkbox"/>	Timing of implementation
	<input type="checkbox"/>	Participation of key players (companies, organisations) and/or key players
	<input type="checkbox"/>	Budget size
	<input type="checkbox"/>	Others ()

3-5 How do you consider the challenges (difficulties, constraints) in implementing each policy? Please comment on [Others] if you recognise any side effects of each policy.

Policy*		[Select all that apply for each policy]
(1)	<input type="checkbox"/>	Subject/entity (Who)
	<input type="checkbox"/>	Target entity (companies, organisations) and fields (Whom/Where)
	<input type="checkbox"/>	Target objective (What)

<input type="checkbox"/>	Timing of implementation
<input type="checkbox"/>	Participation of key players (companies, organisations) and/or key players
<input type="checkbox"/>	Budget size
<input type="checkbox"/>	Others ()

**On the web-based questionnaire, respondents will only answer to the policies that they are aware of and consider had effect (From question 3-2)*

3-6 In general, how successful is the policy in promoting content industry development?

Not Successful	Successful	Very Successful
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3-7 How necessary (important) is each policy for your business and the content industry to develop in your country?

Also, please select and prioritize the top 5 policies you think is most necessary/important.

Policy	[Select one for each policy]			[Select 1-5]
	1. Not Necessary / Important	2. Necessary / Important	3. Very Necessary / Important	
(1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3-8 What are the reasons and what outcome do you expect from these policies? (Please refer to choices in 3-3)

[Please comment]

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3-9 What kind of policies and ideas do you think should be addressed in terms of regional (Asia) content industry development? Please select the top 3 you consider the most important at present and also in the future (after 3 years).

	At present	In the future (3 years)
Incentive schemes (e.g. tax rebates)	<input type="checkbox"/>	<input type="checkbox"/>
Mutual funding and subsidy schemes	<input type="checkbox"/>	<input type="checkbox"/>
Collaboration in anti-piracy measures	<input type="checkbox"/>	<input type="checkbox"/>

Collaboration in developing human resources (labour force, education)	<input type="checkbox"/>	<input type="checkbox"/>
Collaboration in implementing new technologies	<input type="checkbox"/>	<input type="checkbox"/>
Collaboration in holding effective international trade events and expos	<input type="checkbox"/>	<input type="checkbox"/>
Co-production agreements, treaties	<input type="checkbox"/>	<input type="checkbox"/>
Relax in current trade restrictions	<input type="checkbox"/>	<input type="checkbox"/>
Relax in current domestic regulation (e.g. Quotas)	<input type="checkbox"/>	<input type="checkbox"/>
Common content platform (e.g. Pan-Asian TV Channel that broadcasts content from various countries)	<input type="checkbox"/>	<input type="checkbox"/>
Others ()	<input type="checkbox"/>	<input type="checkbox"/>

<Industrial Organisation / Academic Respondents>

Chapter 1. About your organisation

For the sake of recognition, here content industry refers to areas in TV broadcasting, Animation, Film, Music, and Games.

Name of your organisation/department

3-10 Please select your country. [Select one]

<input type="checkbox"/> China	<input type="checkbox"/> Indonesia	<input type="checkbox"/> Japan	<input type="checkbox"/> Malaysia
<input type="checkbox"/> Singapore	<input type="checkbox"/> South Korea	<input type="checkbox"/> Philippines	<input type="checkbox"/> Thailand

3-11 What is your organisation's main interest, in particular the final type product of content? [Select all that apply]

<input type="checkbox"/> TV programme	<input type="checkbox"/> Film	<input type="checkbox"/> Animation	<input type="checkbox"/> Games	<input type="checkbox"/> Music	<input type="checkbox"/> Others (_____)
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3-12 What is your organisation's main interest in terms of value chain? [Select all that apply]

<input type="checkbox"/> Production	<input type="checkbox"/> Post production
<input type="checkbox"/> Broadcasting	<input type="checkbox"/> Distribution (mainly B to B process)
<input type="checkbox"/> Sales (mainly B to C process) *	<input type="checkbox"/> Purchase/Aggregation
<input type="checkbox"/> Manufacturing*	<input type="checkbox"/> Others (_____)

* includes sales/manufacturing of related products (e.g. licensed character goods)

4-1 How would you assess the condition (Strength and Weakness) in the content industry in your country? Please answer for each of the item [(1) – (10)].

[Select one for each item]

Item	Very weak	weak	Moderate	Strong	Very Strong
(1) Ability and skill to create content products (e.g. creating attractive ideas, creating high quality content, modelling business for specific product and services)	1	2	3	4	5
(2) Ability to sell content products (e.g. existence of strong and reliable distribution market, diversity in business models, access to relevant market and overseas)	1	2	3	4	5
(3) Overall market conditions (e.g. existence of high value added markets, ideal competitive environment, level of quality/literacy of consumers)	1	2	3	4	5
(4) Potential domestic content market size (e.g. effective market population, positive correlation with GDP growth)	1	2	3	4	5
(5) Accessibility and availability to financial services (e.g. loans and investments, private fund and capitals, sponsorship)	1	2	3	4	5
(6) Relationships with foreign countries <i>*not specific to certain country</i> (e.g. linkage between countries through languages/cultures/religions, existence of economic partnership such as FTAs)	1	2	3	4	5
(7) Technological infrastructure and environment for consumers to access variety of content (e.g. coverage and penetration of communication and media infrastructure , services, distribution networks)	1	2	3	4	5
(8) Potential human resource for content industries (e.g. effective educational programmes and systems for human resource development, carrier path for talents in the industry, programmes for introducing new technologies)	1	2	3	4	5

Appendix

(9) Relationships with other industries to produce diversity of related products (e.g. existence of reliable manufacturers, distributors, service providers)	1	2	3	4	5
(10) Governmental promotion policies (e.g. various and effective measures to promote the industry development)	1	2	3	4	5

4-2 What are the challenges, the content industry companies in your country are currently facing?

External issues (Market/industry perspective)	<input type="checkbox"/> Lack of fund, financial support
	<input type="checkbox"/> Increase in cost of operation (including cost of labour)
	<input type="checkbox"/> Price reduction of products
	<input type="checkbox"/> Lack of business matching opportunities
	<input type="checkbox"/> Spread of piracy contents (need of content protection mechanism)
	<input type="checkbox"/> Adapting to new business models and technologies
	<input type="checkbox"/> Others (_____)
Internal issues (Business entity perspective)	<input type="checkbox"/> Lack of market information (consumers, suppliers, etc.)
	<input type="checkbox"/> Insufficient labour force (quality and/or quantity)
	<input type="checkbox"/> Insufficient use of new technologies
	<input type="checkbox"/> Insufficient knowledge of oversea promotion
	<input type="checkbox"/> Insufficient knowledge of oversea promotion, international business
	<input type="checkbox"/> Insufficient relationship with reliable business partners
	<input type="checkbox"/> Others (_____)

4-3 What do you consider are the future challenges regarding content industry/business development (domestically, regionally, and internationally)? [Please comment]

[In this section, please refer to the 'Policy categorisation table']

5-1 Are you aware of the current policies or programmes that are implemented in your country, related to each policy? In case one current policy or initiative falls under several items in the list, please select all.

Policy	[Select one for each policy]	
	1. Yes, I am aware of the policies implemented in our country	2. No, I am not aware of any policies implemented in our country
(1)	<input type="checkbox"/>	<input type="checkbox"/>
(2)	<input type="checkbox"/>	<input type="checkbox"/>
(3)	<input type="checkbox"/>	<input type="checkbox"/>
:	<input type="checkbox"/>	<input type="checkbox"/>

5-2 In general, policies and programmes are planned and implemented with expectation to produce good effects. In that sense, what is your current assessment regarding the result of the policy? Do you consider the policies have achieved expected objectives effectively?

Policy*	[Select one for each policy]		
	1. It does not seem effective as expected	2. It seems effective as expected	3. It seems more effective than expected
(1)	<input type="checkbox"/>	<input type="checkbox"/>	
(2)	<input type="checkbox"/>	<input type="checkbox"/>	
(3)	<input type="checkbox"/>	<input type="checkbox"/>	
:	<input type="checkbox"/>	<input type="checkbox"/>	

**On the web-based questionnaire, respondents will only answer to the policies that they are aware of (From question 3-1)*

5-3 What kind of effects/outcomes have you recognised in the content industry as a result of each policy?
Please select the top 3 policies which you consider had the most effectiveness.

Policy*		[Select all that apply for each policy]
(1)	<input type="checkbox"/>	Increase in revenue, market share (domestic markets and/or foreign markets)
	<input type="checkbox"/>	Increase in number of customers/users (market share)
	<input type="checkbox"/>	Increase in business opportunity (domestic markets and/or foreign markets)
	<input type="checkbox"/>	Increase in networking (e.g. relationship with business partners, clients)
	<input type="checkbox"/>	Increase in integrity and stability of business operation
	<input type="checkbox"/>	Increase in investment, financial sponsorship
	<input type="checkbox"/>	Decrease in cost of operation
	<input type="checkbox"/>	Improvement in quality of product
	<input type="checkbox"/>	Improvement in distribution of product (e.g. variety of distribution models, increase in quantity)
	<input type="checkbox"/>	Improvement in fair competition
	<input type="checkbox"/>	Improvement in supply chain (e.g. variety of purchasing products, speed and quality)
	<input type="checkbox"/>	Increase in capability of business (human resource, utilising new technologies)
	<input type="checkbox"/>	Others/unexpected effects ()

5-4 What do you consider the most important element (key success factor) for improving the effectiveness of each policy? Please select the top 3 policies which you consider had the most effectiveness.

Policy*		[Select all that apply for each policy]
(1)	<input type="checkbox"/>	Subject/entity (Who)
	<input type="checkbox"/>	Target entity (companies, organisations) and fields (Whom/Where)
	<input type="checkbox"/>	Timing of implementation
	<input type="checkbox"/>	Participation of key players (companies, organisations) and/or key players
	<input type="checkbox"/>	Budget size
	<input type="checkbox"/>	Others ()

5-5 How do you consider the challenges (difficulties, constraints) in implementing each policy? Please comment on [Others] if you recognise any side effects of each policy.

Policy*		[Select all that apply for each policy]
(1)	<input type="checkbox"/>	Subject/entity (Who)
	<input type="checkbox"/>	Target entity (companies, organisations) and fields (Whom/Where)

<input type="checkbox"/>	Target objective (What)
<input type="checkbox"/>	Timing of implementation
<input type="checkbox"/>	Participation of key players (companies, organisations) and/or key players
<input type="checkbox"/>	Budget size
<input type="checkbox"/>	Others ()

**On the web-based questionnaire, respondents will only answer to the policies that they are aware of and consider had effect (From question 3-2)*

5-6 In general, how successful is the policy in promoting content industry development?

Not Successful	Successful	Very Successful
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5-7 How necessary (important) is each policy for the content industry to develop in your country?

Also, please select and prioritize the top 5 policies you think is most necessary/important.

Policy	[Select one for each policy]			[Select 1-5]
	1. Not Necessary / Important	2. Necessary / Important	3. Very Necessary / Important	
(1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5-8 What are the reasons and what outcome do you expect from these policies? (Please refer to choices in 3-3)
[Please comment]

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5-9 What kind of policies and ideas do you think should be addressed in terms of regional (Asia) content industry development? Please select the top 3 you consider the most important at present and also in the future (after 3 years).

	At present	In the future (3 years)
Incentive schemes (e.g. tax rebates)	<input type="checkbox"/>	<input type="checkbox"/>
Mutual funding and subsidy schemes	<input type="checkbox"/>	<input type="checkbox"/>
Collaboration in anti-piracy measures	<input type="checkbox"/>	<input type="checkbox"/>
Collaboration in developing human resources (labour force, education)	<input type="checkbox"/>	<input type="checkbox"/>

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Collaboration in implementing new technologies	<input type="checkbox"/>	<input type="checkbox"/>
Collaboration in holding effective international trade events and expos	<input type="checkbox"/>	<input type="checkbox"/>
Co-production agreements, treaties	<input type="checkbox"/>	<input type="checkbox"/>
Relax in current trade restrictions	<input type="checkbox"/>	<input type="checkbox"/>
Relax in current domestic regulation (e.g. Quotas)	<input type="checkbox"/>	<input type="checkbox"/>
Common content platform (e.g. Pan-Asian TV Channel that broadcasts content from various countries)	<input type="checkbox"/>	<input type="checkbox"/>
Others ()	<input type="checkbox"/>	<input type="checkbox"/>

<Policy Maker Respondents>

Chapter 1. About your organisation					
<i>For the sake of recognition, here content industry refers to areas in TV broadcasting, Animation, Film, Music, and Games.</i>					
Name of your organisation/department					
5-10 Please select your country. [Select one]					
<input type="checkbox"/> China	<input type="checkbox"/> Indonesia	<input type="checkbox"/> Japan	<input type="checkbox"/> Malaysia		
<input type="checkbox"/> Singapore	<input type="checkbox"/> South Korea	<input type="checkbox"/> Philippines	<input type="checkbox"/> Thailand		
5-11 What is your organisation's main focus in policy making, in particular the final type product of content? [Select all that apply]					
<input type="checkbox"/> TV programme	<input type="checkbox"/> Film	<input type="checkbox"/> Animation	<input type="checkbox"/> Games	<input type="checkbox"/> Music	<input type="checkbox"/> Others (_____)
5-12 What is your organisation's main focus in policy making in terms of value chain? [Select all that apply]					
<input type="checkbox"/> Production		<input type="checkbox"/> Post production			
<input type="checkbox"/> Broadcasting		<input type="checkbox"/> Distribution (mainly B to B process)			
<input type="checkbox"/> Sales (mainly B to C process) *		<input type="checkbox"/> Purchase/Aggregation			
<input type="checkbox"/> Manufacturing*		<input type="checkbox"/> Others (_____)			
* includes sales/manufacturing of related products (e.g. licensed character goods)					

Chapter 2. Current status of the content industry in your country

6-1 How would you assess the condition (Strength and Weakness) in the content industry in your country?
Please answer for each of the item [(1) – (10)].

[Select one for each item]

Item	Very weak	weak	Moderate	Strong	Very Strong
(1) Ability and skill to create content products (e.g. creating attractive ideas, creating high quality content, modelling business for specific product and services)	1	2	3	4	5
(2) Ability to sell content products (e.g. existence of strong and reliable distribution market, diversity in business models, access to relevant market and overseas)	1	2	3	4	5
(3) Overall market conditions (e.g. existence of high value added markets, ideal competitive environment, level of quality/literacy of consumers)	1	2	3	4	5
(4) Potential domestic content market size (e.g. effective market population, positive correlation with GDP growth)	1	2	3	4	5
(5) Accessibility and availability to financial services (e.g. loans and investments, private fund and capitals, sponsorship)	1	2	3	4	5
(6) Relationships with foreign countries <i>*not specific to certain country</i> (e.g. linkage between countries through languages/cultures/religions, existence of economic partnership such as FTAs)	1	2	3	4	5
(7) Technological infrastructure and environment for consumers to access variety of content (e.g. coverage and penetration of communication and media infrastructure, services, distribution networks)	1	2	3	4	5
(8) Potential human resource for content industries (e.g. effective educational programmes and systems for human resource development, carrier path for talents in the industry, programmes for introducing new technologies)	1	2	3	4	5
(9) Relationships with other industries to produce diversity of related products	1	2	3	4	5

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(e.g. existence of reliable manufacturers, distributors, service providers)					
(10) Governmental promotion policies (e.g. various and effective measures to promote the industry development)	1	2	3	4	5

6-2 What are the challenges, the content industry and companies in your country are currently facing?

External issues (Market/industry perspective)	<input type="checkbox"/> Lack of fund, financial support
	<input type="checkbox"/> Increase in cost of operation (including cost of labour)
	<input type="checkbox"/> Price reduction of products
	<input type="checkbox"/> Lack of business matching opportunities
	<input type="checkbox"/> Spread of piracy contents (need of content protection mechanism)
	<input type="checkbox"/> Adapting to new business models and technologies
	<input type="checkbox"/> Others (_____)
Internal issues (Business entity perspective)	<input type="checkbox"/> Lack of market information (consumers, suppliers, etc.)
	<input type="checkbox"/> Insufficient labour force (quality and/or quantity)
	<input type="checkbox"/> Insufficient use of new technologies
	<input type="checkbox"/> Insufficient knowledge of oversea promotion
	<input type="checkbox"/> Insufficient knowledge of oversea promotion, international business
	<input type="checkbox"/> Insufficient relationship with reliable business partners
	<input type="checkbox"/> Others (_____)

6-3 What do you consider are the future challenges regarding content industry/business development (domestically, regionally, and internationally)? [Please comment]

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Chapter 3. Evaluation of the current policy for content industry promotion

[In this section, please refer to the 'Policy categorisation table']

7-1 What are the current policies or programmes that are implemented in your country, related to each policy? In case one current policy or initiative falls under several items in the list, please select all.

Policy	[Select one for each policy]		
	1. Yes, we have policies or initiatives	2. No, we don't have policies or initiatives but we have future plans for implementation	3. No, we don't have policies or initiatives and don't have any plans for implementation
(1)	<input type="checkbox"/> ()	<input type="checkbox"/>	<input type="checkbox"/>
(2)	<input type="checkbox"/> ()	<input type="checkbox"/>	<input type="checkbox"/>
(3)	<input type="checkbox"/> ()	<input type="checkbox"/>	<input type="checkbox"/>
:	<input type="checkbox"/> ()	<input type="checkbox"/>	<input type="checkbox"/>

7-2 In general, policies and programmes are planned and implemented with expectation to produce good effects.

In that sense, what is your current assessment regarding the result of the policy? Do you consider the policies have achieved expected objectives effectively?

Policy*	[Select one for each policy]		
	1. It does not seem effective as expected	2. It seems effective as expected	3. It seems more effective than expected
(1)	<input type="checkbox"/>	<input type="checkbox"/>	
(2)	<input type="checkbox"/>	<input type="checkbox"/>	
(3)	<input type="checkbox"/>	<input type="checkbox"/>	
:	<input type="checkbox"/>	<input type="checkbox"/>	

**On the web-based questionnaire, respondents will only answer to the policies that they are aware of (From question 3-1)*

7-3 What kind of effects/outcomes have you recognised in the content industry as a result of each policy? Please select the top 3 policies which you consider had the most effectiveness.

Policy*	[Select all that apply for each policy]	
(1)	<input type="checkbox"/>	Increase in revenue (domestic markets and/or foreign markets)
	<input type="checkbox"/>	Increase in number of customers/users
	<input type="checkbox"/>	Increase in business opportunity (domestic markets and/or foreign markets)
	<input type="checkbox"/>	Increase in networking (e.g. relationship with business partners, clients)
	<input type="checkbox"/>	Increase in integrity and stability of business operation

<input type="checkbox"/>	Increase in investment, financial sponsorship
<input type="checkbox"/>	Decrease in cost of operation
<input type="checkbox"/>	Improvement in quality of product
<input type="checkbox"/>	Improvement in distribution of product (e.g. variety of distribution models, increase in quantity)
<input type="checkbox"/>	Improvement in fair competition
<input type="checkbox"/>	Improvement in supply chain (e.g. variety of purchasing products, speed and quality)
<input type="checkbox"/>	Increase in capability of business (human resource, utilising new technologies)
<input type="checkbox"/>	Others/unexpected effects ()

7-4 What do you consider the most important element (key success factor) for improving the effectiveness of each policy? Please select the top 3 policies which you consider had the most effectiveness.

Policy*	[Select all that apply for each policy]
(1)	<input type="checkbox"/> Subject/entity (Who)
	<input type="checkbox"/> Target entity (companies, organisations) and fields (Whom/Where)
	<input type="checkbox"/> Timing of implementation
	<input type="checkbox"/> Participation of key players (companies, organisations) and/or key players
	<input type="checkbox"/> Budget size
	<input type="checkbox"/> Others ()

7-5 How do you consider the challenges (difficulties, constraints) in implementing each policy? Please comment on [Others] if you recognise any side-effects of each policy.

Policy*	[Select all that apply for each policy]
(1)	<input type="checkbox"/> Subject/entity (Who)
	<input type="checkbox"/> Target entity (companies, organisations) and fields (Whom/Where)
	<input type="checkbox"/> Target objective (What)
	<input type="checkbox"/> Timing of implementation
	<input type="checkbox"/> Participation of key players (companies, organisations) and/or key players
	<input type="checkbox"/> Budget size
	<input type="checkbox"/> Others ()

**On the web-based questionnaire, respondents will only answer to the policies that they are aware of and consider had effect (From question 3-2)*

7-6 In general, how successful is the policy in promoting content industry development?

Not Successful	Successful	Very Successful
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7-7 How necessary (important) is each policy for the content industry to develop in your country? Also, please select and prioritise the top 5 policies you think is most necessary/important.

Policy	[Select one for each policy]			[Select 1-5]
	1. Not Necessary / Important	2. Necessary / Important	3. Very Necessary / Important	
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(2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7-8 What are the reasons and what outcome do you expect from these policies? (Please refer to choices in 3-3)

[Please comment]

7-9 What kind of policies and ideas do you think should be addressed in terms of regional (Asia) content industry development? Please select the top 3 you consider the most important at present and also in the future (after 3 years).

	At present	In the future (3 years)
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Mutual funding and subsidy schemes	<input type="checkbox"/>	<input type="checkbox"/>
Collaboration in anti-piracy measures	<input type="checkbox"/>	<input type="checkbox"/>
Collaboration in developing human resources (labour force, education)	<input type="checkbox"/>	<input type="checkbox"/>
Collaboration in implementing new technologies	<input type="checkbox"/>	<input type="checkbox"/>
Collaboration in holding effective international trade events and expos	<input type="checkbox"/>	<input type="checkbox"/>
Co-production agreements, treaties	<input type="checkbox"/>	<input type="checkbox"/>
Relax in current trade restrictions	<input type="checkbox"/>	<input type="checkbox"/>
Relax in current domestic regulation (e.g. Quotas)	<input type="checkbox"/>	<input type="checkbox"/>
Common content platform (e.g. Pan-Asian TV Channel that broadcasts content from various countries)	<input type="checkbox"/>	<input type="checkbox"/>
Others ()	<input type="checkbox"/>	<input type="checkbox"/>

Appendix

Policy Areas	Policy Activities	
Industry and market development	1	Set industrial visions/master plans and develop statistics in order to establish benchmarks and tools
	2	Create industrial clusters, promote market creation that boosts content demand (including practical use of government and public produced content), foster new business models (e.g. sharing best practices)
Organisational scheme, Business relationship	3	Establish new organisations (e.g. industrial associations, consortia) to aggregate industrial interests and/or functions (e.g. funding, marketing, business support)
	4	Support for building business relationship (e.g. Business matchmaking, promoting partnerships)
International relationship	5	International agreements (e.g. promoting co-production schemes, trade treaties)
	6	Promote brands and campaigns, host or support for participation in international trade events and meetings
Human Resources	7	Standardise business skills, establish qualification/certification framework for related skills and knowledge
	8	Foster educational systems (e.g. academic degree, internship, training)
Finance	9	Introduce incentive schemes (e.g. tax incentives) to encourage investment
	10	Establish governmental financing schemes (e.g. subsidy, funds), promote private financing
Technology	11	Standardise technology and protect interoperability to increase adoption and usage of business entities
	12	Foster R&D and technology innovation, develop communication network and media to enhance distribution and consumption of content products
Legal framework	13	Introduce and review regulatory framework for market entry, content quotas
	14	Introduce and review intellectual property rights protection/management and anti-piracy schemes
	15	Introduce and review content rating framework (regulations or guidelines to introduce self-regulation by the industry)